

## **2004-2005 Application Processing/Delivery System Update - 1st Draft Videoconference Treatment -**

The purpose of this videoconference is to provide financial aid administrators with updates and changes for the 2004-2005 Title IV aid application processing cycle. The content is organized into six main topic areas reflecting phases of the application processing “life-cycle.” These topics will be presented using a combination of pre-recorded segments and live panelists led in discussion by a moderator. Graphics will be used to supplement the discussion and add variety.

A panel of presenters, made up of FSA staff members, will be seated in chairs similar to most talk shows. The proposed panel may include FSA staff members Marilyn LeBlanc, Daria Adams, Ida Mondragon, Nina Colon, and Ginger Klock. The Moderator, Doris McMillon, will be seated at the end, angled to face the panelists.

Throughout the broadcast viewers will be encouraged to interact with panelists by providing questions via fax, email or live phone calls. Panelists will answer these questions during three scheduled Question and Answer segments. Department of Education experts will be seated in the audience, available to respond to questions that cannot be answered by the panelists.

Finally, in brief segments called “Who’s Been Paying Attention?” viewers will be asked to answer questions covering topics previously discussed in the broadcast. Providing their responses via fax, email, or phone, viewers will win small prizes (tee shirts or mugs) for correct answers.

### **Segment 1:**

#### **Introduction and Welcome**

**3 minutes**

An off-camera announcer will introduce the broadcast and Doris McMillon. Doris will welcome audience and panelists.

Topics will include:

- 1.) A broad outline of topics to be covered and the format of the broadcast
- 2.) How participants can interact with the program during the Q & A segments (including fax numbers, phone numbers and email address)
- 3.) The “Who’s Been Paying Attention?” rules, including how to provide answers and the fact that prizes (tee shirt or mug) will be awarded to the winners
- 4.) An introduction of Jennifer Douglas

## **Segment 2:**

### **Getting Ready**

**Jennifer Douglas**

**5 minutes**

Jennifer will welcome participants to the videoconference and provide a brief overview of topics that will help schools get ready for the upcoming processing year.

These topics will include:

- 1.) Why changes are made each year to the various areas (focus groups, comments received from schools, usability testing, legislation/policy changes, system changes, etc.)
- 2.) Important 2004-2005 dates
- 3.) Toolkit availability
- 4.) Ordering paper applications (use most current number of 2003-2004 Web applications as an indication that schools should be able to order fewer than last year)
- 5.) FOTW demo site availability
- 6.) Renewal application process
- 7.) 2004-2005 system start up
- 8.) Good SSN match for student needed for disbursement (TBD)
- 9.) Must pay on primary EFC (TBD)

In conclusion, Jennifer will encourage participants to ask questions and thank schools for working with FSA to simplify the application process for students.

## **Segment 3:**

### **New Data Elements for Paper and Web Applications 12 minutes total**

This segment will feature both a live discussion and a pre-recorded video. Opening live in the studio, Doris will introduce the segment and the panelists.

#### **Panel Discussion**

**8 minutes**

In this segment FSA staff members will discuss changes to the paper FAFSA for 2004-2005. The discussion will be supplemented with graphics showing the fields on the FAFSA being discussed.

Topics will include:

- 1) Color of the FAFSA
  - a) Pink for students
  - b) Purple for parents
  - c) SAR printed on white paper with pink wash at the top
- 2) Page 1
  - a) Deadlines
  - b) Instructions for correcting estimated tax data
- 3) Page 2
  - a) Web site reference for exchange rates
  - b) Further clarified what is not an investment
- 4) Page 3

- a) #13-student's email address moved and more explanation provided
- b) #31-drug question renumbered
- 5) Page 4
  - a) #43-45-student's asset net worth questions reordered
  - b) #49-wording for "graduate" dependency revised
  - c) #53-wording revised
- 6) Page 5
  - a) Added questions for parents' first name initial (#59 and #63) and date of birth (#60 and #64), which eliminates the need to ask for older parent
- 7) Page 6
  - a) #98-moved enrollment question from page 3 and reworked to clarify responses (Did not change questions about loans and work-study)
  - b) Added Pell Grant certification (non-final)
- 8) For paper Renewal FAFSA, will roll forward responses to additional questions
  - a) School codes from transaction used to create renewal
  - b) Housing plans for each school code listed
  - c) Enrollment status
  - d) Parent's marital status date
- 9) For paper Renewal FAFSA, will not roll forward
  - a) Income fields for students who qualify for Automatic Zero EFC
  - b) Parents' SSN and last name information

Doris will introduce the next portion of this segment, FOTW Changes. FSA staff members will discuss Web application changes and introduce the pre-record.

### **Pre-Record: FOTW Changes**

**2 minutes**

The pre-recorded portions of this segment will include a demonstration of FAFSA on the Web showing key screens and changes for 2004-2005.

Topics will include:

- 1.) Mandatory housing code
- 2.) Addition of parent's email address (parent will receive notification when FAFSA is processed and if signature is missing)
- 3.) Translated worksheets (Spanish)
- 4.) Enhancements of edits and skip logic
- 5.) Ease of signing and submitting (students and parents can sign electronically within application)
- 6.) Reminder to students to watch for email blocks

### **Panel Discussion:**

**2 minutes**

The panel will further discuss the paper and Web application changes providing background, rationale, and/or more specific details for items shown in the pre-record. Doris McMillon will guide the discussion.

**Break****2 minutes**

Doris will remind the viewing audience of the fax, phone numbers, and email address for submitting questions. During a musical performance, a slide presentation will summarize key points made in the previous segment. Breaks provide an opportunity for participants to accumulate questions for the Q&A segment that follows.

**Q & A****9 minutes**

Calls, emails, and faxes will be screened and directed to either the panelists or the audience experts. Doris will direct each question to the appropriate panelist or audience expert.

**“Who’s Been Paying Attention?”****1 minute**

Doris will pose Question #1 providing fax, phone numbers, and email information. She will inform viewers that the winner will be announced later in the broadcast.

**Segment 4:****Web: Student Access****14 minutes total**

This portion of the videoconference will feature alternating segments of pre-recorded content and live discussion. Doris will introduce the topic. She will also introduce its presenter(s), if they have not yet been introduced. The presenter(s) will provide an overview of the Student Access Web site and introduce the pre-recorded video piece that follows.

**Pre-Record: Real-time Processing for Corrections****2 minutes**

The first pre-recorded portion of this segment will feature a student making an application correction and receiving processed results in real time.

**Panel Discussion:****5 minutes**

The panel will further discuss the topics shown in the pre-recorded portions of the segment. Doris McMillon will guide the discussion.

In addition, the panelists will discuss that FSA is also moving to real-time processing for renewal applications. The CPS will:

- 1) Carry forward from previous year certain database match results
- 2) Process renewal for independent student in real-time if no other matches are required and student does not change identifiers
- 3) Get confirmation for real-time processing

Doris will introduce the next topic, Electronic Signatures. The presenter(s) will provide an introduction to electronic signatures and introduce the pre-recorded video piece that follows.

**Pre-Record: Student/Parent Electronic Signatures****2 minutes**

The first pre-recorded portion of this segment will feature a student or parent signing their application using an electronic signature.

**Panel Discussion:****5 minutes**

The panel will further discuss electronic signatures and how they work providing background, rationale, and/or more specific details for items shown in the pre-record. Doris McMillon will guide the discussion.

**Segment 5:****Web: FAA Access****28 minutes total**

This portion of the videoconference features alternating segments of pre-recorded content and live discussion. Doris will introduce the topic, Benefits for the FAA. The presenter(s) will provide an overview of the FAA Access Web site and introduce the pre-recorded video piece that follows.

**Pre-Record: Overview - Benefits for the FAA****3 minutes**

This segment will feature an FAA using the FAA Access Web site. It will show an overview of the site and highlight the benefits the site offers to the FAA.

Topics will cover 2004-2005 functions available including:

- 1.) Student inquiry
- 2.) PIN requests
- 3.) Signature hold file request
- 4.) Application/correction entry
- 5.) Access a saved application/correction
- 6.) ISIR requests (new)
- 7.) Adding FAA Access demo site for practice and training staff

**Panel Discussion:****3 minutes**

The panel will further discuss the benefits to using FAA Access providing background, rationale, and/or more specific details for items shown in the pre-record. Doris McMillon will guide the discussion.

Doris will introduce the next topic, Entry and Inquiry Functions. The presenter(s) will provide an introduction to important entry and inquiry functions of the FAA Access Web site and introduce the pre-recorded video piece that follows.

**Pre-Record: Entry and/or inquiry****2 minutes**

This segment will feature a demo of the FAA Access Web site highlighting important entry and inquiry functions and features of the site.

Topics will include:

- 1.) Enhanced skip logic for applicants qualifying for Automatic Zero EFC
- 2.) The printed signature page will include summary of application information entered by the FAA
- 3.) Real-time processing for students who do not need data matches (TBD)

- 4.) Additional flags providing more information
- 5.) Viewable student application transactions and viewable records that do not list the student's school if the school has the student's DRN
- 6.) Added Application Status Check

**Panel Discussion:**

**5 minutes**

The panel will further discuss the functions of FAA Access providing background, rationale, and/or more specific details for items shown in the pre-record. Doris McMillon will guide the discussion.

**“Who’s Been Paying Attention?”**

**1 minute**

Doris will announce the winner of Question #1 and pose Question #2. She will inform viewers that the winner will be announced later in the broadcast.

Doris will introduce the next topic, Verification Worksheet and Corrections, and its presenter(s). The presenter(s) will provide information about the verification worksheet and corrections with FAA Access and introduce the pre-recorded video piece that follows.

**Pre-record: Verification Worksheet and Corrections**

**2 minutes**

This segment will feature a demonstration of the FAA Access Website highlighting the verification worksheet and corrections functions.

Topics will include the new EDExpress Application Processing functionality available for 2004-2005:

- 1) Verification Worksheet
- 2) Estimated taxes paid calculator

**Panel Discussion:**

**2 minutes**

The panel will further discuss the verification worksheet and corrections with FAA Access providing background, rationale, and/or more specific details for items shown in the pre-record. Doris McMillon will guide the discussion.

Doris will introduce the next topic, the ISIR Datamart. The presenter(s) will provide an overview of the ISIR Datamart functions within the FAA Access Web site and introduce the pre-recorded video piece that follows.

**Pre-record: ISIR Datamart**

**2 minutes**

This segment will feature a demo of the FAA Access Website highlighting the ISIR Datamart functions.

Topics will include:

- 1) ISIR delivery options for schools
  - a) Daily
  - b) By Destination Point Administrator request using query options

- 2) Certain ISIRs automatically “pushed” to school
- 3) Policy implications for schools
  - a) Schools must draw down ISIRs for all enrolled applicants
- 4) Datamart-specific message classes

**Panel Discussion:**

**8 minutes**

The panel will further discuss the ISIR Datamart providing background, rationale, and/or more specific details for items shown in the pre-record. Doris McMillon will guide the discussion.

**Break**

**2 minutes**

Doris will remind the viewing audience of the fax, phone numbers, and the email address for submitting questions. During a musical performance, a still slide presentation will summarize key points and important dates made in the previous segment.

**Q & A**

**9 minutes**

Calls, emails, and faxes will be screened and directed to either the panelists or the audience experts. Doris will direct each question to the appropriate person.

**“Who’s Been Paying Attention?”**

**1 minute**

Doris will announce the winner of Question #2 and pose Question #3. She will also inform viewers that the winner will be announced following the next segment.

**Segment 6:**

**CPS Changes**

**12 minutes**

This segment features a live discussion of CPS changes. Doris will introduce the segment and its presenter(s).

**Panel Discussion**

**12 minutes**

In this segment FSA staff members will discuss CPS changes for 2004-2005. The discussion will be supplemented with graphics illustrating the changes being discussed.

Topics will include:

- 1) INS match renamed to DHS
- 2) SSN Match expanded to include parents of dependent applicant
- 3) Applicants whose parent has SSA Date of Death will get a SAR comment instead of rejecting
- 4) Added verifiable rejects if parent’s DoB not matched on SSA database
  - a) S-Father’s DoB does not match
  - b) T-Mother’s DoB does not match
- 5) Added non-verifiable rejects if parent’s SSN not matched on SSA database
  - a) 6-Father’s SSN does not match
  - b) 7-Mother’s SSN does not match
- 6) Added rejects for dependent students

- a) 12-Taxes paid greater than or equal to AGI (non-verifiable)
- b) G-Taxes paid less than AGI, but greater than 50% of AGI (verifiable)
- 7) Added warning comment code for paper filers who reported parent's marital status as single but provided SSNs for two parents
- 8) Multi-year database (allows cross-year edits to be performed)
- 9) Reduced number of message classes
- 10) New ISIR codes for
  - a) Data Source
  - b) Data Type
- 11) More information provided on ISIR via additional flags
  - a) Indicates whether transaction resulted from change only to address or email address
  - b) Parent SSN match flag
- 12) Verification tracking flag on ISIR expanded to 4 characters
- 13) Not moving to XML ISIR until 05-06
- 14) Additions to SAR
  - a) Variable text on first page if student has eligibility issues
  - b) Parent email address (not correctable on SAR)
  - c) Instructions to call FSAIC to request a copy of the SAR

### **“Who’s Been Paying Attention?”**

**1 minute**

Doris will announce the winner of Question #3.

### **Break**

**2 minutes**

Doris will remind the viewing audience of the fax and phone numbers and email address for submitting questions during the Q & A session following the break. During a musical performance, a slide presentation will summarize key points and important dates made in the previous segment.

### **Q & A**

**9 minutes**

Calls, emails, and faxes will be screened and directed to either the panelists or the audience experts. Doris will direct each question to the appropriate person.

### **Segment 7:**

#### **EDExpress and Other Tools**

**7 minutes total**

This segment will feature both live discussion and pre-recorded content. Doris will introduce the topic and its presenter(s). The presenter(s) will provide an introduction to the topic and introduce the pre-recorded video piece that follows.

#### **Pre-Record:**

**2 minutes**

This segment will show EDExpress and FAA Access. It will focus on how to link from Express to FAA Access, which functions have changed or been deleted, and which have stayed the same.

Topics include:



- 1) For 2004-2005, all application entry and correction is via FAA Access
  - a) This functionality is no longer available via EDEExpress
  - b) Can continue to link to FAA Access via EDEExpress
  - c) No change to vendor software process
- 2) Combined “look and feel” of Direct Loan and Pell modules to make the two processes more similar or “common”
- 3) Moving ISIR Analysis software tool to the Web
- 4) Moving Return of Title IV Funds software (“R2T4”) to the Web

**Panel Discussion:**

**5 minutes**

The panel will further discuss EDEExpress and FAA Access. Doris McMillon will guide the discussion.

Topics will cover retaining other Application Processing functionality in EDEExpress including:

- 1) ISIR Import
- 2) ISIR Print
- 3) ISIR Review Tab
- 4) List-Processed ISIRs
- 5) NSLDS Print
- 6) File Format/External Export

**Segment 8: Close**

**3 minutes**

Doris McMillon will wrap up the broadcast:

- 1.) Thank the panelists and expert audience participants
- 2.) Reiterate any of the important dates, phone numbers, and Web sites discussed throughout the conference
- 3.) Give viewers information about the fall 2003 Electronic Access Conferences (San Diego November 2-5 and New Orleans December 2-5).
- 4.) Remind viewers that a copy of today’s broadcast can be viewed on the Web or borrowed through the FSAIC videotape library
- 5.) Thank the audience for their participation